# Course Material
# ERPNext

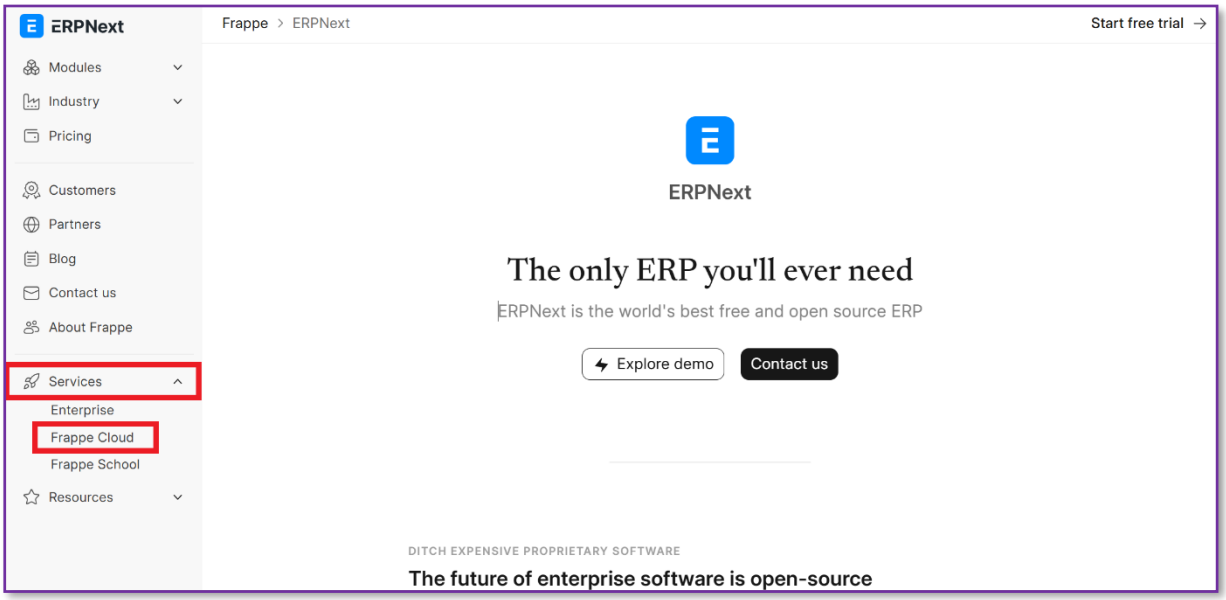
Table of Contents

Installation ..... 1
ERPNext – User Guide ..... 4

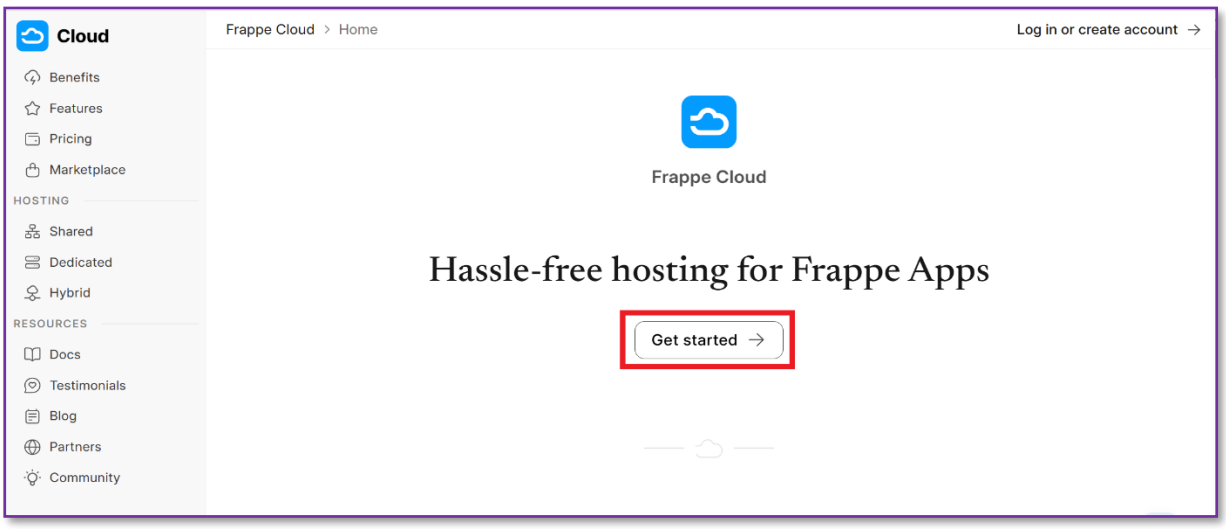
## Installation

### Sign Up/Log In:

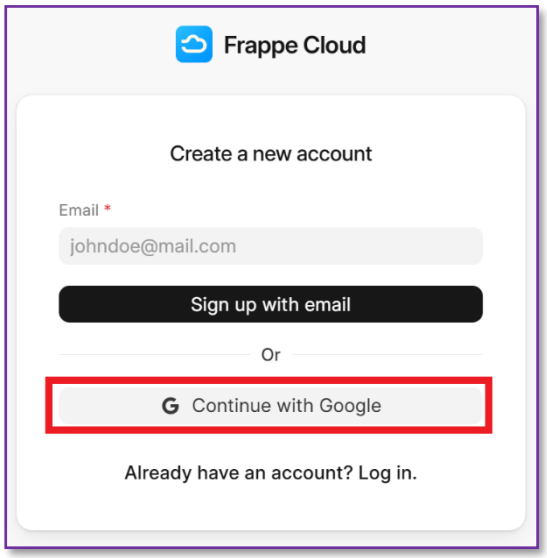
1. Go to https://frappe.io/erpnext
2. Click on **Services → Frappe Cloud**.



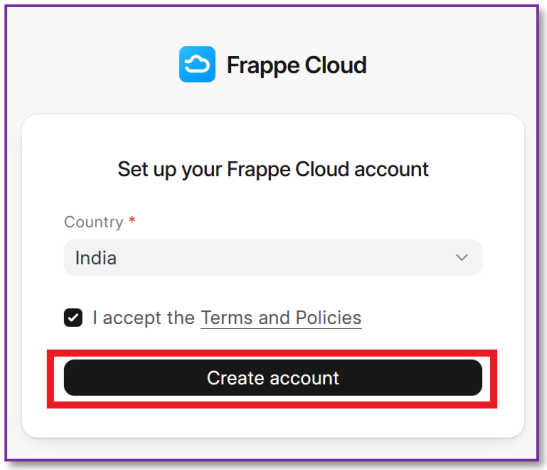

3. Click on **Get started.**



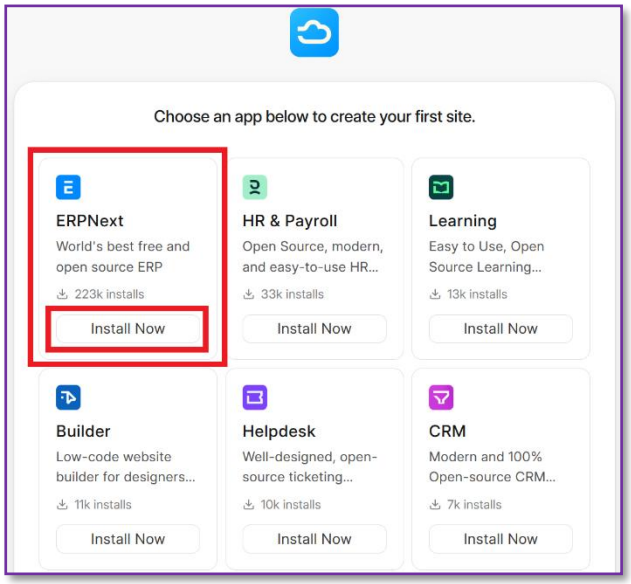
4. Click on **Continue with Google** to create a Frappe Cloud account using your Google ID.



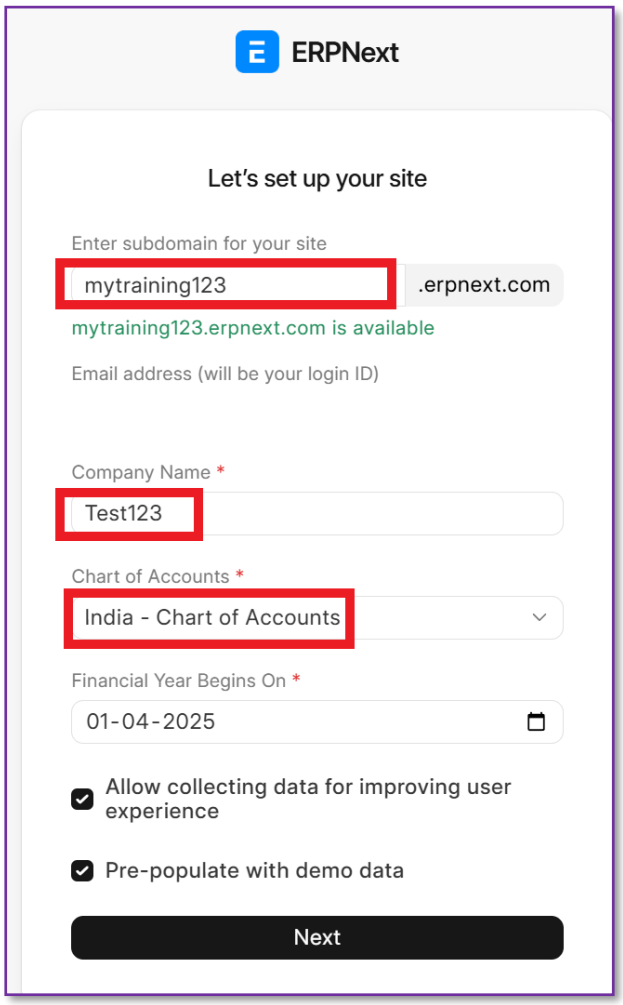

5. Click on **Create account** and follow the steps to set up your ERPNext account.



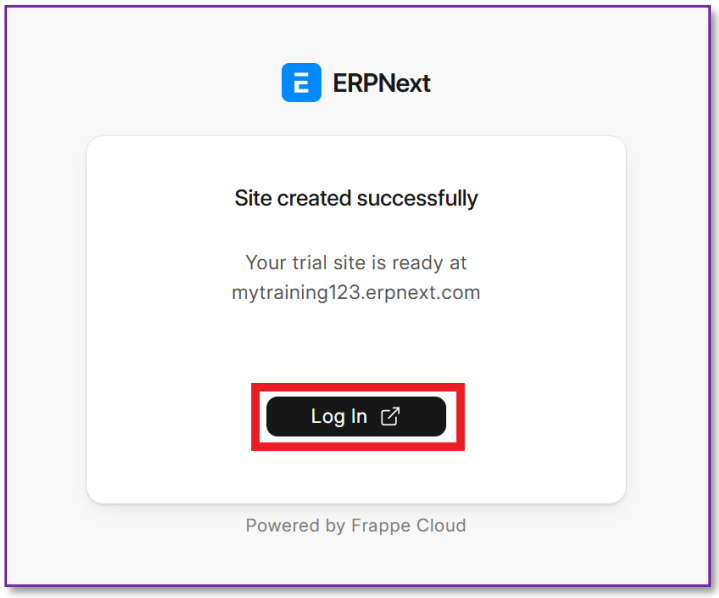

**Step 1:** Choose **ERPNext** and click on **Install Now**.



**Step 2:** Choose a subdomain name for your site and ensure its availability. Use your organization or institution name as the company name. Select **India – Chart of Accounts** and set the financial year beginning date. Click **Next** after updating the details.

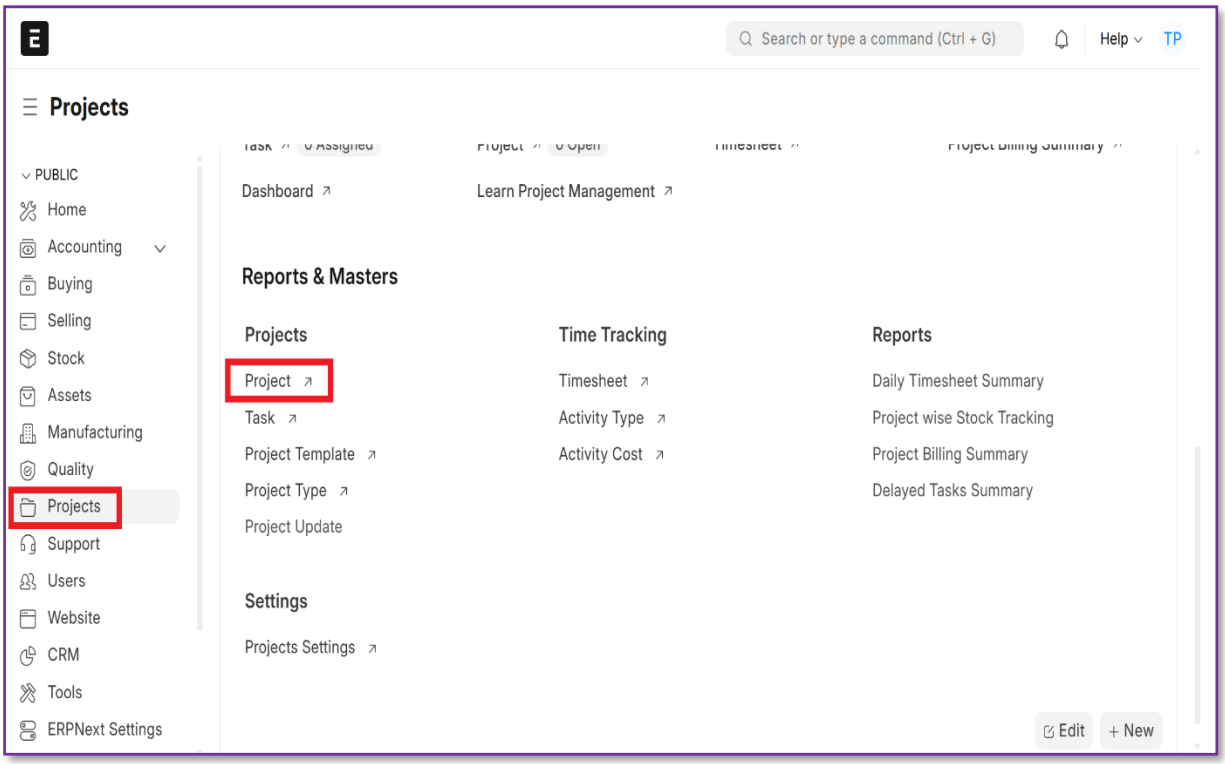



**Step 3:** Click on **Log In** once the site is successfully created.

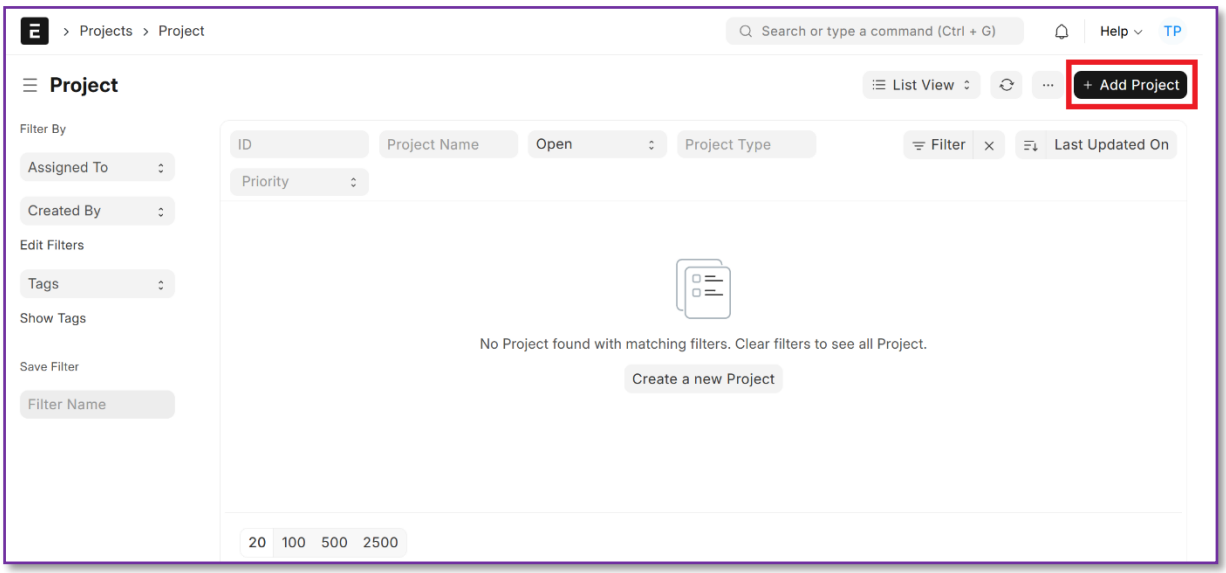


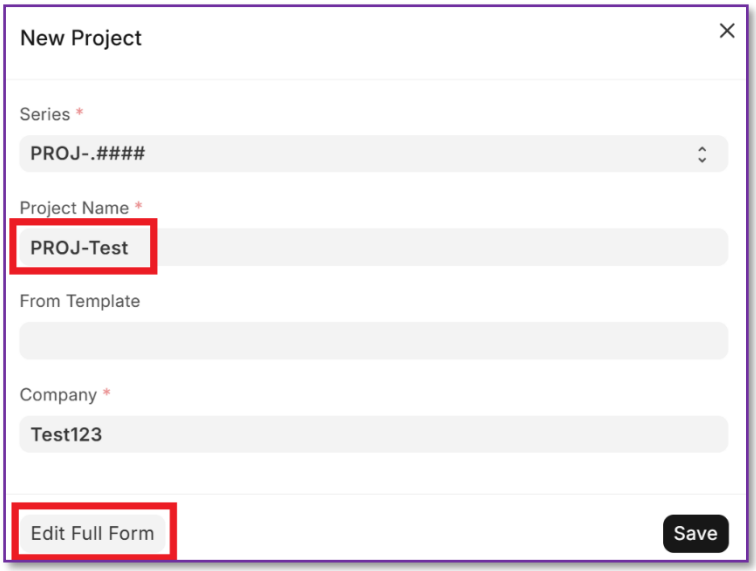
# ERPNext – User Guide

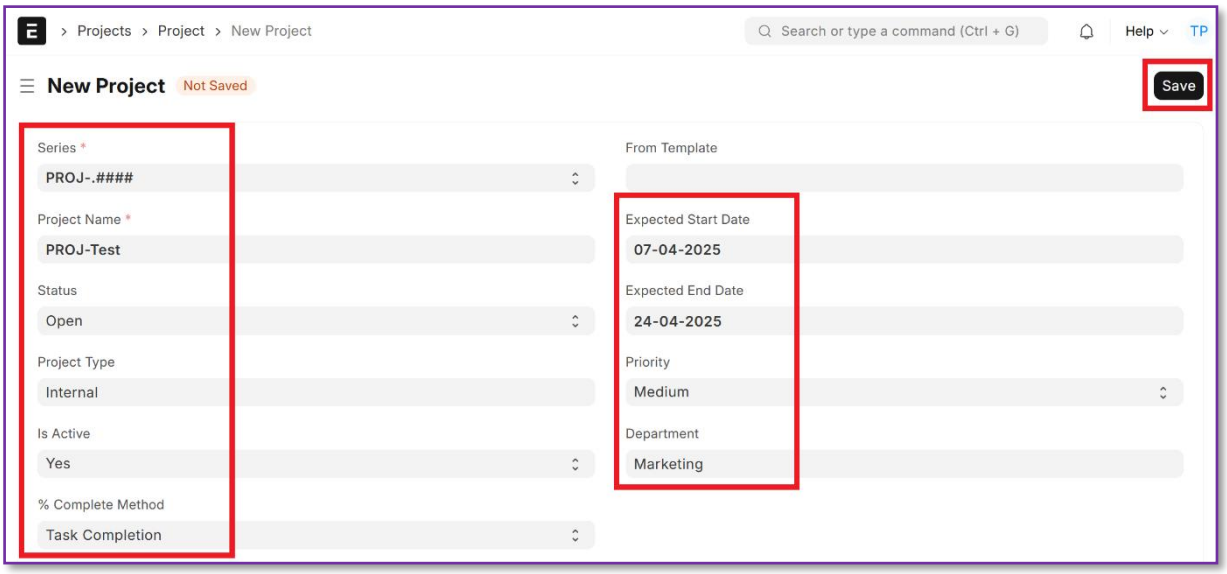
1. ERPNext dashboard will launch. Click on **Projects** and scroll down to select **Project** under **Reports & Masters**.



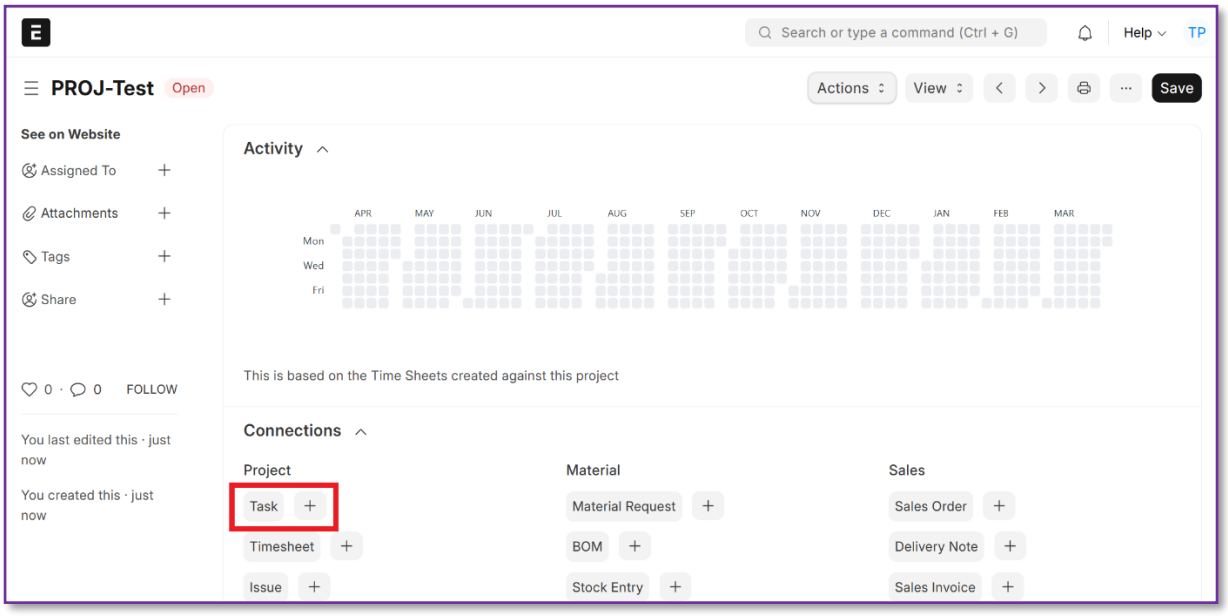

2. Click on + **Add Project** to create a new project. Enter the desired project name and click on **Edit Full Form** to add more details. Enter the required details and click on **Save** to create the project.



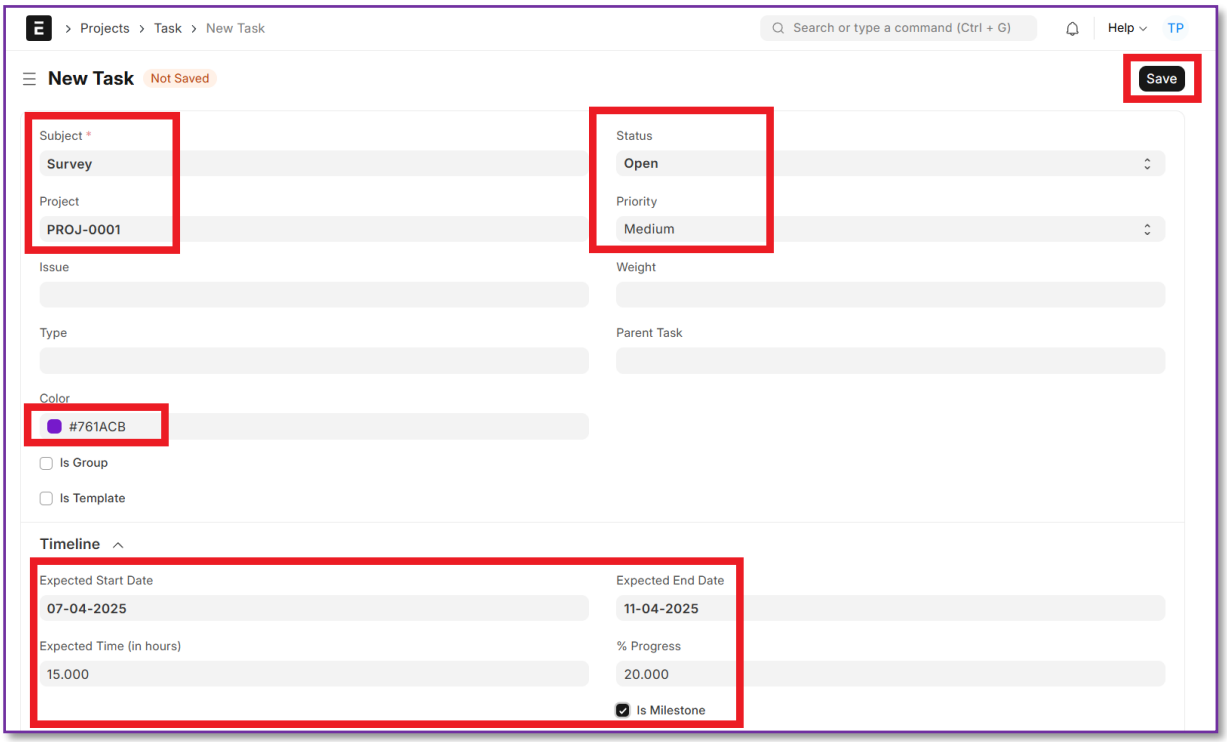


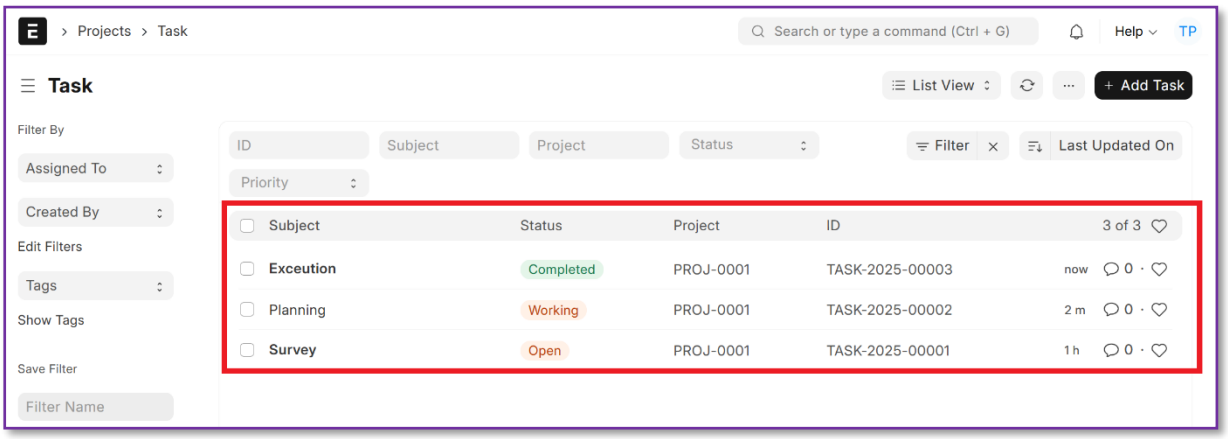

3. Click on the + beside **Task** to create new tasks under the project.



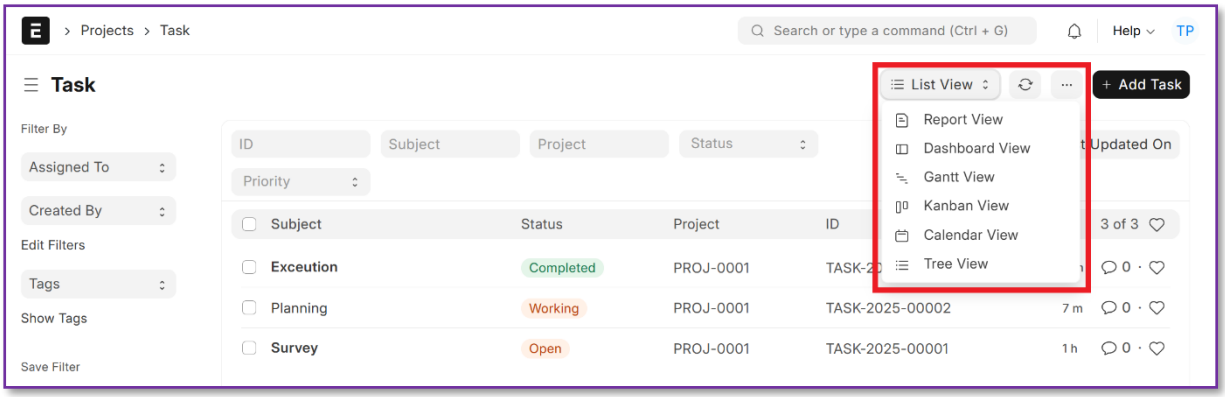
4. Create a new task named Survey or any desired name, enter the required details, and click **Save**. Assign a color to each task to make differentiation easier.

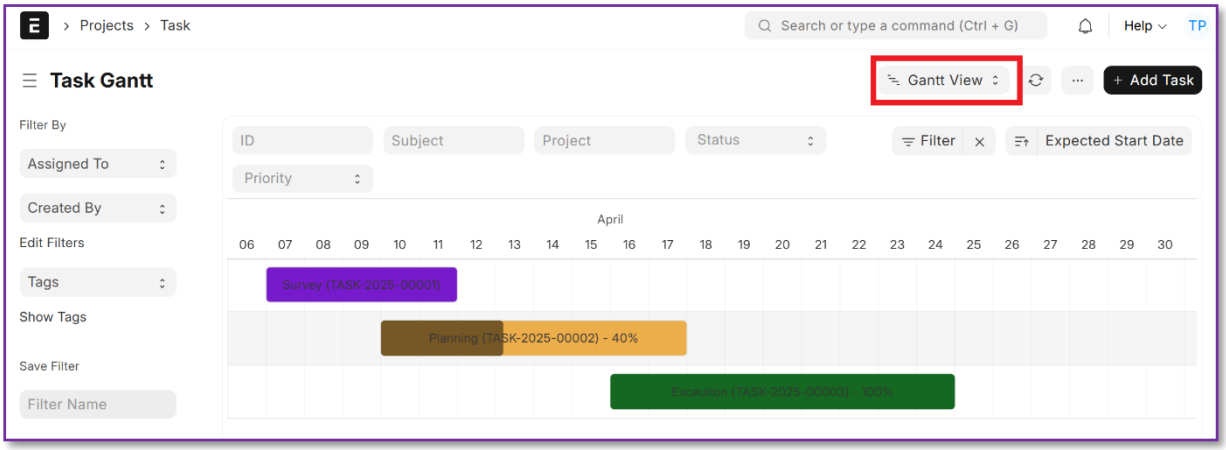


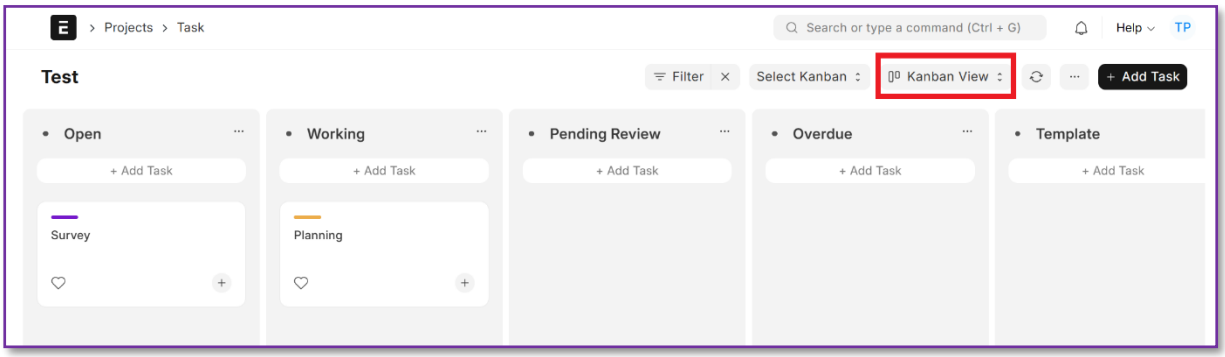

5. Go to https://mytraining123.erpnext.com/app/task and create additional tasks such as Working (In-Progress) and Completed.

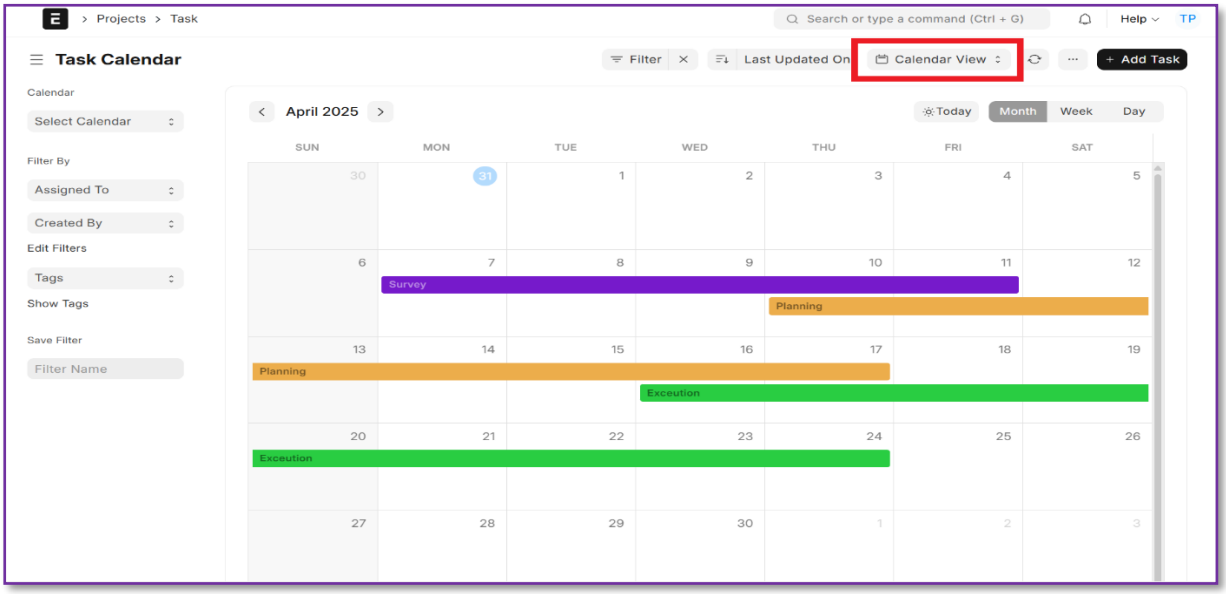
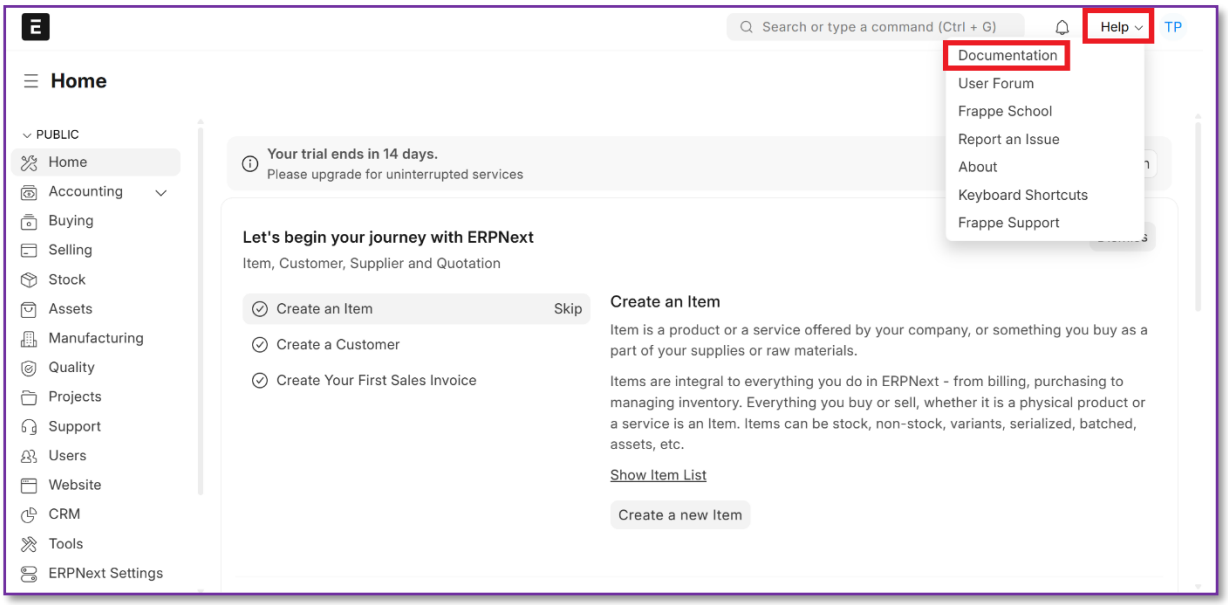



6. Click on **List View** to quickly access **Gantt, Kanban, and Calendar** views, and more. These views provide an instant overview of the entire project.


Projects > Task
Search or type a command (Ctrl + G)
Help
TP
Task
List View
Add Task
Report View
Dashboard View
Gantt View
Kanban View
Calendar View
Tree View
Filter By
Assigned To
Created By
Edit Filters
Tags
Show Tags
Save Filter
ID
Subject
Project
Status
Priority
Updated On
Subject
Status
Project
ID
3 of 3
Exceution
Completed
PROJ-0001
Planning
Working
PROJ-0001
TASK-2025-00002
7 m
Survey
Open
PROJ-0001
TASK-2025-00001
1 h


Projects > Task
Search or type a command (Ctrl + G)
Help
TP
Task Gantt
Gantt View
Add Task
Filter By
Assigned To
Created By
Edit Filters
Tags
Show Tags
Save Filter
Filter Name
ID
Subject
Project
Status
Priority
Filter
Expected Start Date
April
06 07 08 09 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30
Survey (TASK-2025-00001)
Planning (TASK-2025-00002) - 40%


Projects > Task
Search or type a command (Ctrl + G)
Help
TP
Test
Filter
Select Kanban
Kanban View
Add Task
Open
Working
Pending Review
Overdue
Template
+ Add Task
Survey
Planning


Projects > Task
Search or type a command (Ctrl + G)
Help
TP
Task Calendar
Filter
Last Updated On
Calendar View
Add Task
Calendar
Select Calendar
Filter By
Assigned To
Created By
Edit Filters
Tags
Show Tags
Save Filter
Filter Name
April 2025
Today
Month
Week
Day
SUN
MON
TUE
WED
THU
FRI
SAT
Survey
Planning
Planning
Exceution
Exceution

7. Go to the ERPNext homepage and click on **Help → Documentation** to access all available resources, including tutorials and guides.